

MANAGING FOR SUCCESS®

Customer Service Version

*"He who knows others is learned.
He who knows himself is wise."
-Lao Tse*

Jane Smith

Consumer Relations

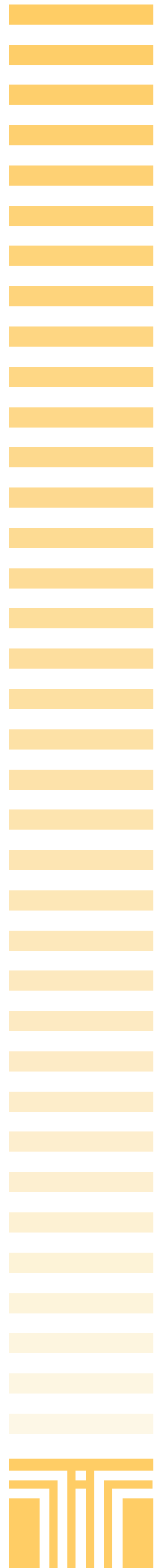
Sample Report

13/7/2001

"Enabling Businesses to Succeed through People"

People Success Solutions

EXPERTS IN UNDERSTANDING BEHAVIOUR, VALUES AND SOFT SKILLS
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INTRODUCTION

Successful business depends on Customer Service. It is essential to understand that every employee is involved in customer service. Everyone in every organization is a customer of some kind. It has been proven that customers would rather switch to another company than tolerate poor service. Research indicates, even if there is no conflict, over 60% of all customers quit dealing with a business because of indifference on the part of some employee.

The ability to interact effectively with customers may be the critical difference between success or failure in our work life. Effective customer service begins with an accurate perception of our own work behavioural style. This report was designed to quantify information on how you see your own behaviour in the workplace. That information may then be used for you to learn how others perceive your behaviour. This knowledge will assist you in formulating strategies in meeting customer needs.

GENERAL CHARACTERISTICS

Based on your responses, the report has selected general statements to provide you with a broad understanding of your Customer Service Style. This section of the report identifies the natural customer service style you bring to the job.

Jane can be possessive and develop strong attachments for her work group, close friends and family. Others see her as a good neighbour, since she is always willing to help those she considers to be her friends. At times she can be quite sceptical. Others may misinterpret this strength as a negative one, but she is only seeking needed data. Once "in the groove" of an established work pattern, Jane can follow it with seemingly unending patience. Patience, control and deliberateness characterize her usual behaviour. She may have difficulty sharing her feelings if it may disturb the relationship. She is extremely conscientious, and is painstaking with work that requires attention to detail and accuracy. She likes to start and finish activities. Others who work with her know they can depend on her. Jane may not project a sense of urgency like some people with different behavioural styles. She requires many good reasons, as well as the benefits involved, before agreeing to making changes. She sometimes finds it difficult to relax until all the work is completed. Leisure time activities often include friends and family. She strives to maintain the status quo, since she tends to resist change, particularly when it is unexpected or sudden.

Jane adheres to company policy and does not break the rules just for the sake of breaking them. Logic is important when trying to influence her. She pays more attention to logic than emotional "hype." She is good at analysing situations that can be felt, touched, seen, heard, personally observed or experienced. Her motto is, "facts are facts." She prefers to plan her work and work her plan. Others may find it refreshing to have her on their team. When faced with a tough decision, she will seek information and analyze it thoroughly. She may tend to fight for her beliefs or those things she feels passionate about. Once she has arrived at a decision, she can be tough-minded and unbending. She has made her decision after gathering much data, and she probably will not want to repeat the process. She is persistent and persevering in her approach to achieving goals.

Jane likes having others initiate the conversation. She can then assess the situation and respond accordingly. She tends to be possessive of information; that is, she does not voluntarily share information with others outside of her team. This may be a blessing, or a curse, to her superiors. She likes to know what is expected of her in a working relationship and have the duties and responsibilities of others who will be involved explained. Communication is accomplished best by well-defined avenues. She remains aloof from active participation in unfamiliar groups. She will talk more, however, in a group of people she trusts and has known for a long time. Sometimes she will withdraw from a verbal battle. If she feels strong about an issue, she may retreat to gather her resources and then return to take a stand! She is not easily triggered or explosive, but she may conceal some grievances because she does not always state her feelings. She usually is considerate, compassionate and accepting of others; however, on some occasions can become stubborn. Stubbornness surfaces when her ideals and beliefs are confronted. She can be outgoing at times. Basically introverted, she will "engage" in social

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GENERAL CHARACTERISTICS

conversation when the occasion warrants.

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PERCEPTIONS

A person's behaviour and feelings may be quickly telegraphed to others. This section provides additional information on your self-perception and how, under certain conditions, others may perceive your behaviour. Understanding this section will empower you to project the image that will allow you to control the situation.

"See Yourself As Others See You"

SELF-PERCEPTION

You usually sees yourself as being:

Considerate
Good-Natured
Team player

Thoughtful
Dependable
Good listener

OTHERS' PERCEPTION

Under moderate pressure, tension, stress or fatigue, others may see you as being:

Nondemonstrative
Unconcerned

Hesitant
Inflexible

And, under extreme pressure, stress or fatigue, others may see you as being:

Possessive
Detached

Stubborn
Insensitive

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DESCRIPTORS

Based on your responses, the report has marked those words that describe your personal behaviour. They describe how you solve problems and meet challenges, influence people, respond to the pace of the environment and how you respond to rules and procedures set by others.

| Dominance | Influencing | Steadiness | Compliance |
|---------------|-----------------|---------------------|-----------------------|
| Demanding | Effusive | Phlegmatic | Evasive |
| Egocentric | Inspiring | Relaxed | Worrisome |
| Driving | Magnetic | Resistant to Change | Careful |
| Ambitious | Political | Nondemonstrative | Dependent |
| Pioneering | Enthusiastic | Passive | Cautious |
| Strong-Willed | Demonstrative | Patient | Conventional |
| Forceful | Persuasive | Possessive | Exacting |
| Determined | Warm | Predictable | Neat |
| Aggressive | Convincing | Consistent | Systematic |
| Competitive | Polished | Deliberate | Diplomatic |
| Decisive | Poised | Steady | Accurate |
| Venturesome | Optimistic | Stable | Tactful |
| Inquisitive | Trusting | | Open-Minded |
| Responsible | Sociable | | Balanced Judgment |
| Conservative | Reflective | Mobile | Firm |
| Calculating | Factual | Active | Independent |
| Cooperative | Calculating | Restless | Self-Willed |
| Hesitant | Skeptical | Alert | Stubborn |
| Low-Keyed | Logical | Variety-Oriented | Obstinate |
| Unsure | Undemonstrative | Demonstrative | Opinionated |
| Undemanding | Suspicious | Impatient | Unsystematic |
| Cautious | Matter-of-Fact | Pressure-Oriented | Self-Righteous |
| Mild | Incisive | Eager | Uninhibited |
| Agreeable | Pessimistic | Flexible | Arbitrary |
| Modest | Moody | Impulsive | Unbending |
| Peaceful | Critical | Impetuous | Careless with Details |
| Unobtrusive | | Hypertense | |

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CUSTOMER SERVICE FLEXIBILITY

Since customers are different, the needs they have, and that must be met, are also different. The information in this section will help you identify types of customers and provide you with the strategies to meet their needs.

"Improving Your Interactive Flexibility"

When interacting with a customer who has the following characteristics:

- Fast-paced speech
- Gives a strong first impression
- Impatient
- Direct
- Tries to control the situation

Factors that will improve Service with this Style of Customer:

- Speed up - omit some of the details
- Speak with confidence
- Flatter their ego
- Do not waste their time
- Stress Service - be fast and efficient
- Stress new products and service

Factors that will create tension or dissatisfaction with this Style of Customer:

- Not reacting quickly
- Speaking slowly and deliberately

CUSTOMER SERVICE FLEXIBILITY

"Improving Your Interactive Flexibility"

When interacting with a customer who has the following characteristics:

- Friendly and talkative
- Impulsive
- Uses many hand gestures when speaking
- Gets emotional
- Imprecise about the use of time

Factors that will improve Service with this Style of Customer:

- Be more demonstrative with your facial gestures
- Be flexible with your time schedule....allow time for them to talk
- Let them know you enjoy their company
- Be prepared for them to be emotional
- Let them know you are interested in helping them

Factors that will create tension or dissatisfaction with this Style of Customer:

- Not sharing information freely
- Not displaying a sense of urgency

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CUSTOMER SERVICE FLEXIBILITY

"Improving Your Interactive Flexibility"

When interacting with a customer who has the following characteristics:

- Patient
- Easy going
- Uses an unemotional tone of voice
- Reserved
- Deliberate - methodical

Factors that will improve Service with this Style of Customer:

- Maintain a friendly environment
- Show a demonstrated need for urgency
- Present information in a systematic fashion
- If change is necessary, give many reasons and benefits
- Show sincere appreciation
- Stress security
- Assure them that many others are using your product/service

Factors that will create tension or dissatisfaction with this Style of Customer:

- Not demonstrating personal attention
- Being possessive of information

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CUSTOMER SERVICE FLEXIBILITY

"Improving Your Interactive Flexibility"

When interacting with a customer who has the following characteristics:

- Speaks slowly
- Asks questions about facts and data
- Deliberate in actions
- Uses few gestures
- Sceptical
- Suspicious

Factors that will improve Service with this Style of Customer:

- Be diplomatic and courteous
- Do not ask probing, personal questions
- Avoid criticism of their comments or choices
- Provide assurances of correct decisions
- Avoid sudden or abrupt changes
- Do not threaten them

Factors that will create tension or dissatisfaction with this Style of Customer:

- Sloppy work environment
- Overselling

SITUATIONAL STRATEGIES

Use this page for ideas on how to control the interaction between yourself and a customer when the following situations arise. When a customer is upset, you must first gain control of the situation - then read the customer's style and apply the appropriate strategy.

CUSTOMER

Sceptical, Suspicious

Nervous, irritable, high strung

Pessimistic, grouchy, complaining

Egotistical, opinionated, high hat

Argumentative, blustering

Silent, secretive

STRATEGY

Agree on minor points and expand. Be conservative in assertions.

Use a quiet, tactful, soothing manner.

Listen patiently, ask questions to find out their real concerns.

Flatter their ego. Concentrate on getting results.

Create response by challenging in a sincere manner.

Be more personal than usual to draw them out.

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ACTION PLAN

Name: Jane Smith

Customers I have the most difficult time relating to could be described as:

- 1.
- 2.
- 3.
- 4.

To improve my Customer Service with them, I need to work on the following:

- 1.
- 2.
- 3.
- 4.

Other Customers who cause me discomfort are:

- 1.
- 2.
- 3.
- 4.

To improve my Customer Service with them, I need to work on the following:

- 1.
- 2.
- 3.
- 4.

Date _____ Signature _____

STYLE ANALYSIS™ GRAPHS

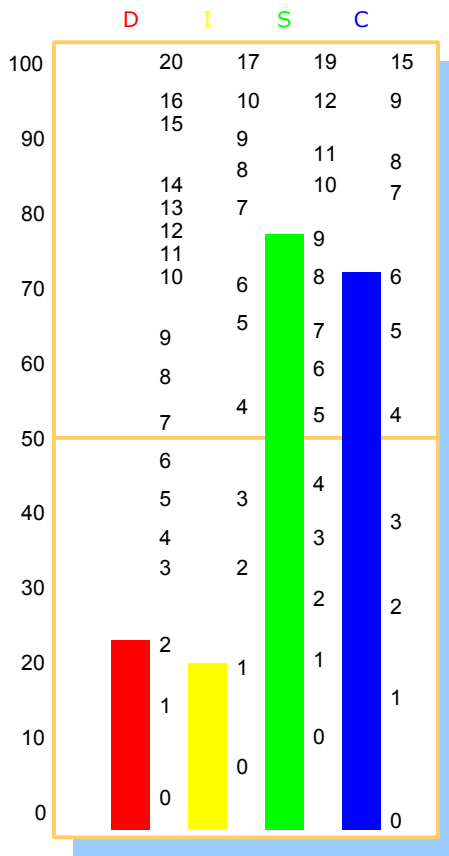
Jane Smith

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MOST

Graph I

Adapted Style



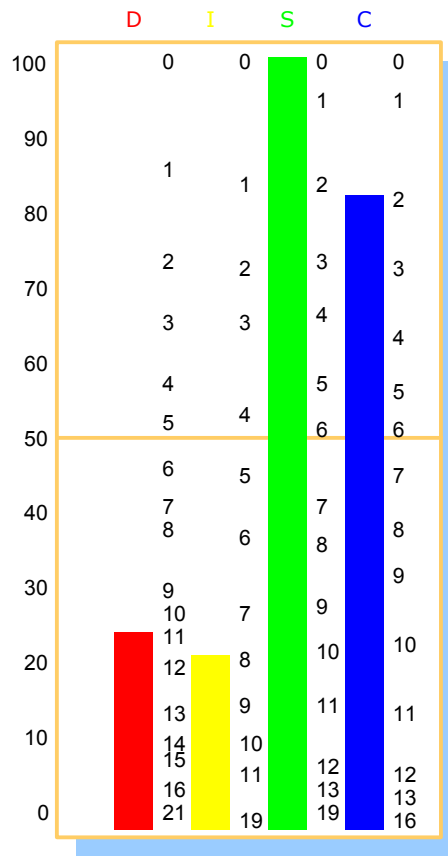
Score
%

| | | | |
|----|----|----|----|
| 2 | 1 | 9 | 6 |
| 24 | 21 | 77 | 72 |

LEAST

Graph II

Natural Style



| | | | |
|----|----|-----|----|
| 11 | 8 | 0 | 2 |
| 25 | 22 | 100 | 82 |

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THE SUCCESS INSIGHTS® WHEEL

The Success Insights® Wheel is a powerful tool popularized in Europe. In addition to the text you have received about your behavioural style, the Wheel adds a visual representation that allows you to:

- View your natural behavioural style (circle).
- View your adapted behavioural style (star).
- Note the degree you are adapting your behaviour.
- If you filled out the Work Environment Analysis, view the relationship of your behaviour to your job.

Notice on the next page that your Natural style (circle) and your Adapted style (star) are plotted on the Wheel. If they are plotted in different boxes, then you are adapting your behaviour. The further the two plotting points are from each other, the more you are adapting your behaviour.

If you are part of a group or team who also took the behavioural assessment, it would be advantageous to get together, using each person's Wheel, and make a master Wheel that contains each person's Natural and Adapted style. This allows you to quickly see where conflict can occur. You will also be able to identify where communication, understanding and appreciation can be increased.

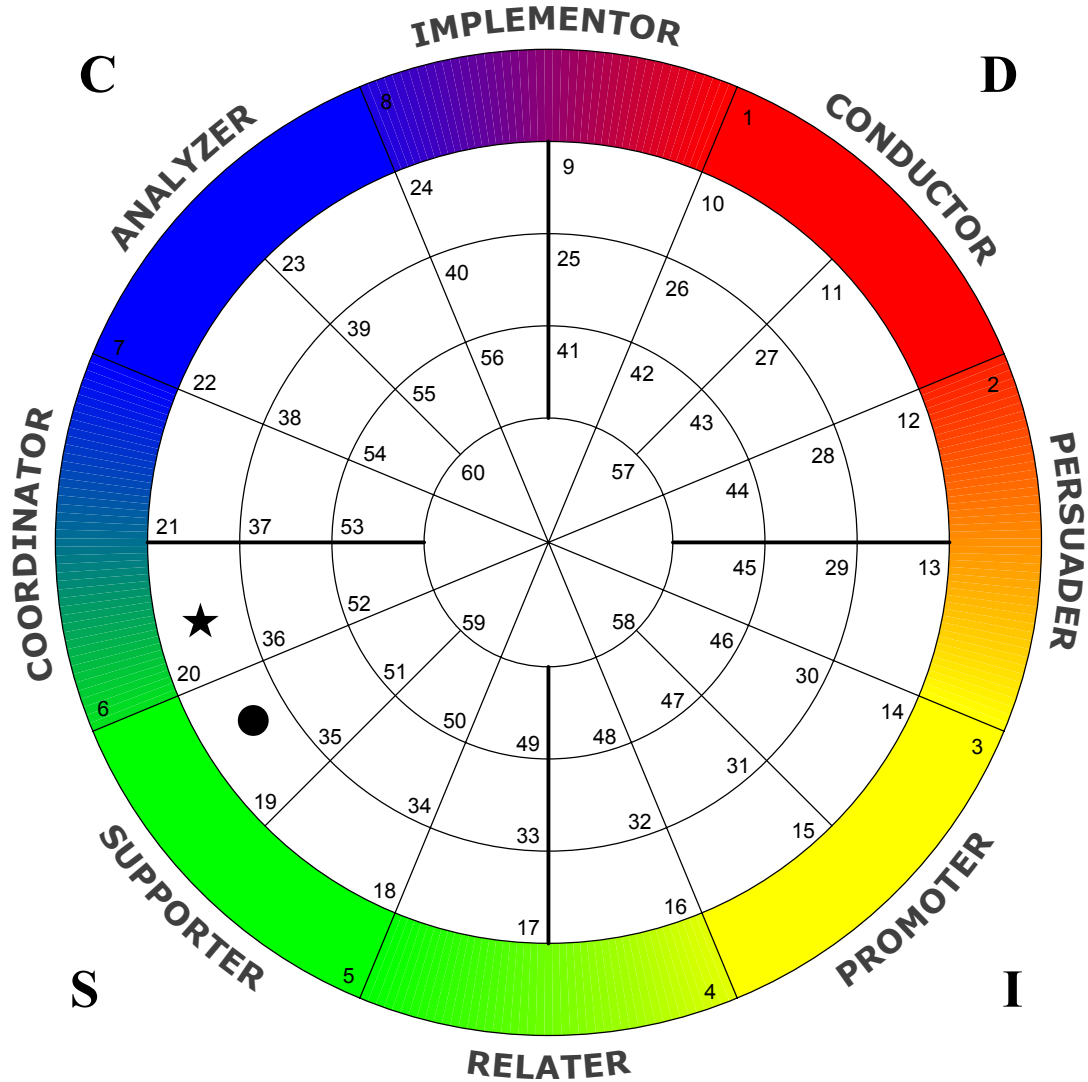
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THE SUCCESS INSIGHTS® WHEEL

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Adapted: ★ (20) SUPPORTING COORDINATOR

Natural: ● (19) COORDINATING SUPPORTER

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